Sage 50 Accounts
Data Management 2025

The Data Management Tool

Presenter: **Matt**

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Data Management 2025
Sage 50 Accounts

What's covered in today's webinar?

- **Why manage your data?**

- **What is the Data Management tool?**

- **What are the steps in Data Management?**

- **Access the Data Management tool**

- **Demonstration**

- **Further support + Q&A**

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Housekeeping

Your microphone is muted automatically

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Questions

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Why manage your data?

Benefits

- Completely optional process

- Keep your data relevant

- Speed up searches in your accounts

- Avoid errors

- Permanently removes data from your company

Resolution

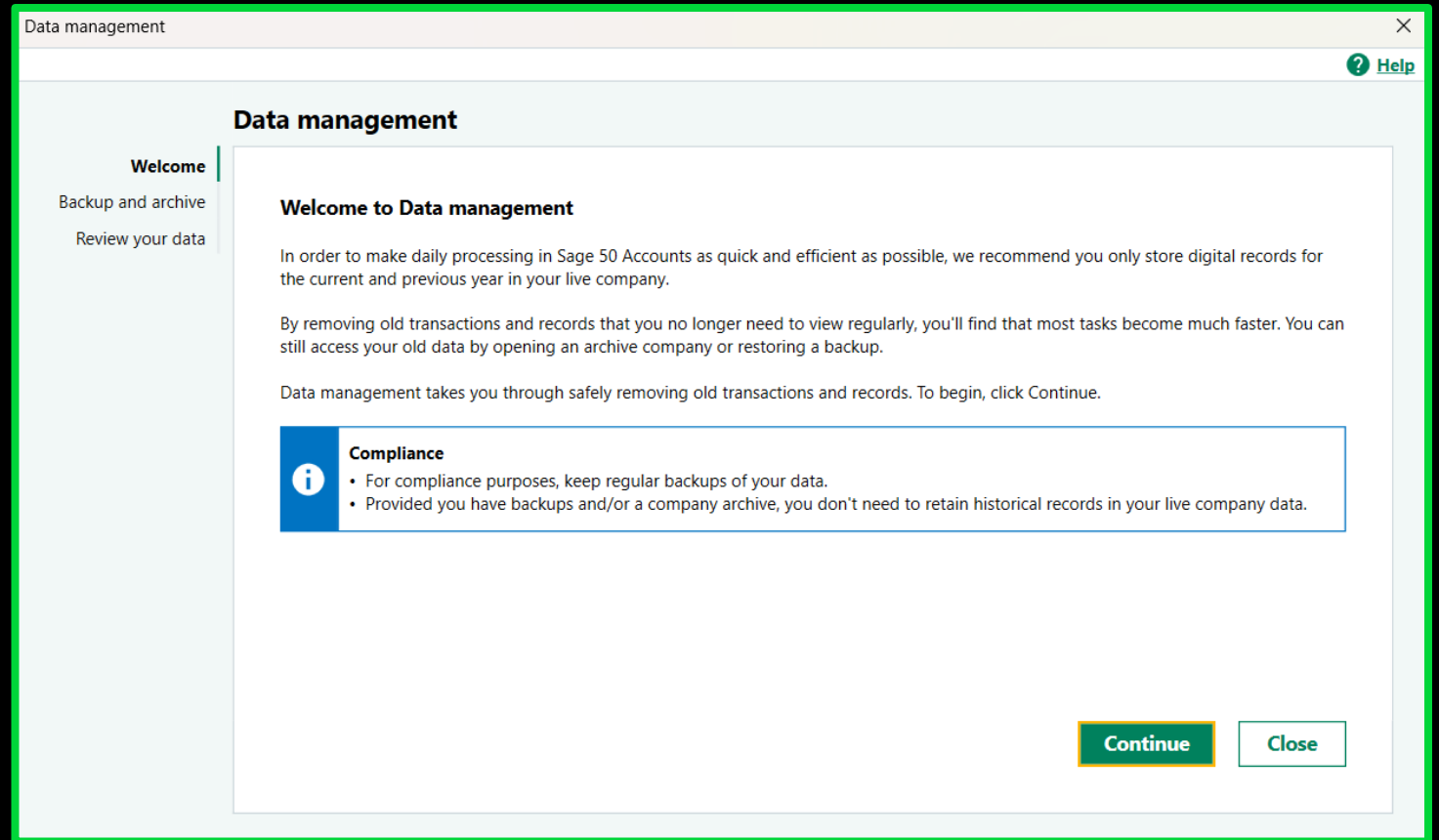As a rough guide we recommend that to optimise performance you have:

- Fewer than 250,000 transactions, or if using Sage Accounts 2014 or below, fewer than 100,000 transactions

- Fewer than 50,000 invoices

- Fewer than 50,000 sales orders

- Fewer than 50,000 purchase orders

- Fewer than 5,000 customer records

- Fewer than 5,000 supplier records

- Fewer than 20,000 product records

- Fewer than 2,000 project records

Click here for data limits

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What is the Data Management tool?

Data Management tool

- Designed to help you maintain the relevance and size of your accounts data
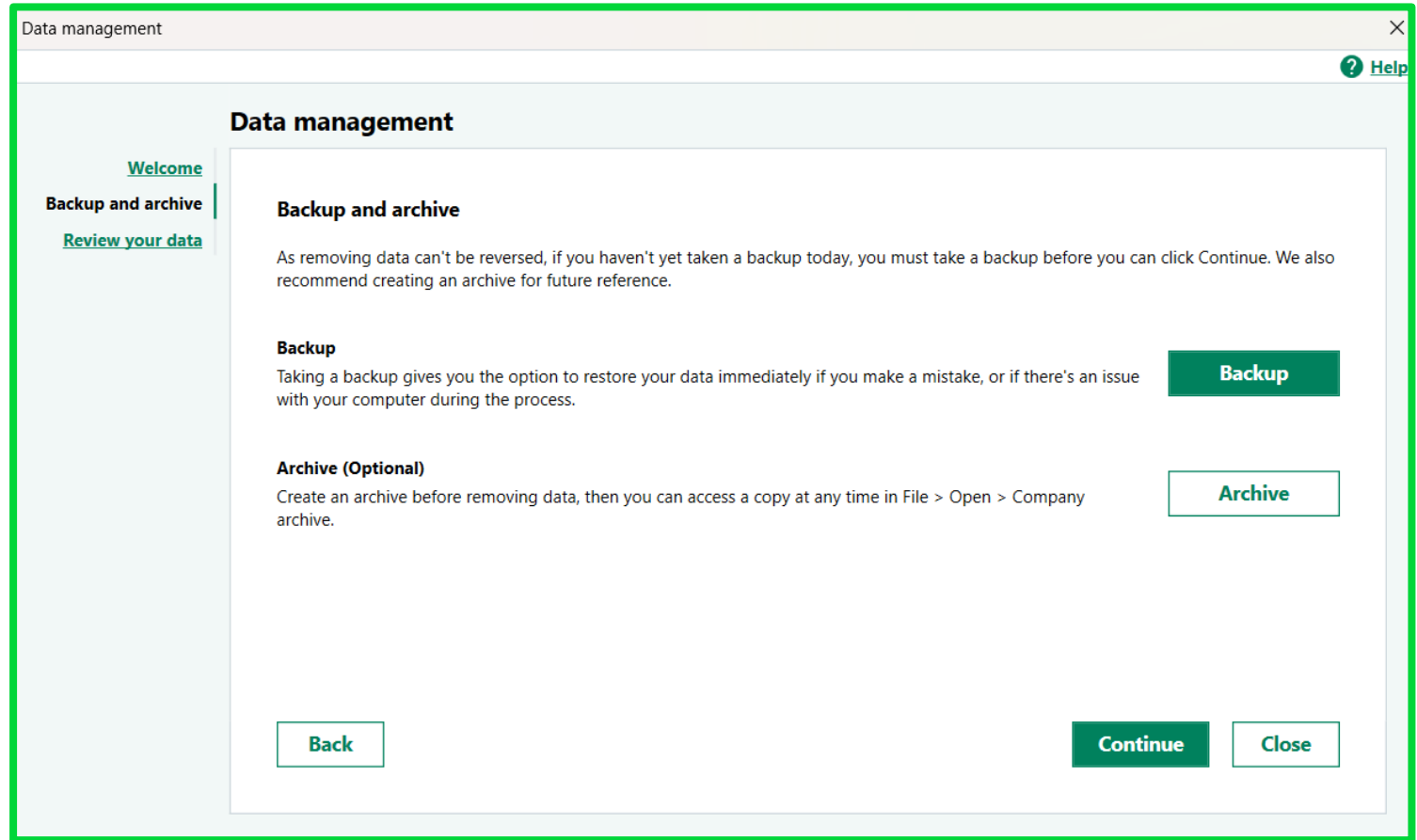
What are the steps in Data Management

Back up

- Must be logged in as manager or have the relevant permissions
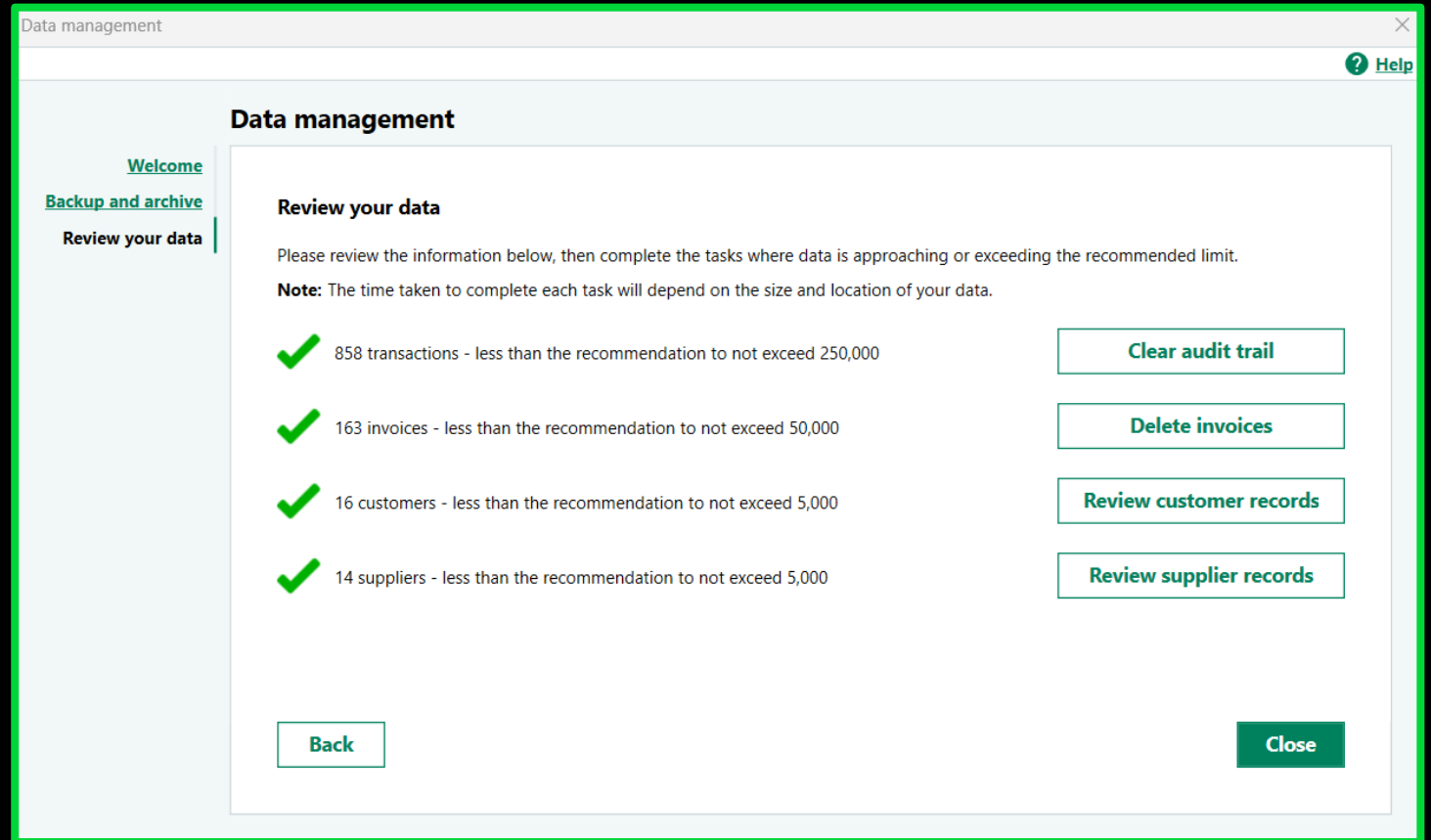
- File > Backup > OK

Archive

- Must be logged in as manager or have the relevant permissions

- Tools > Period End > Archive Company

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What are the steps in Data Management

Review your data options

- Clear audit trail

- Delete invoices

- Review customer records

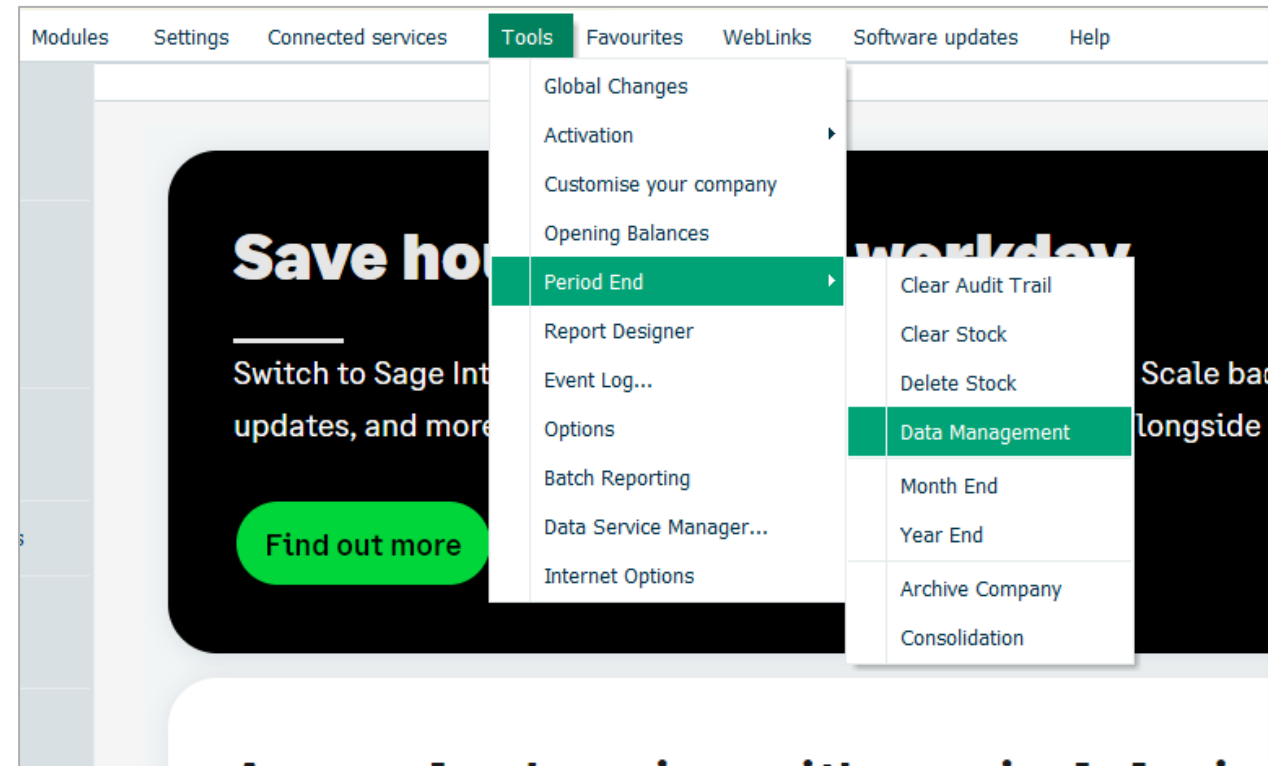- Review supplier records

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The Data Management tool

Access the tool

- Tools > Period End > Data Management

Note: If not available:

- Settings > Company Preferences >
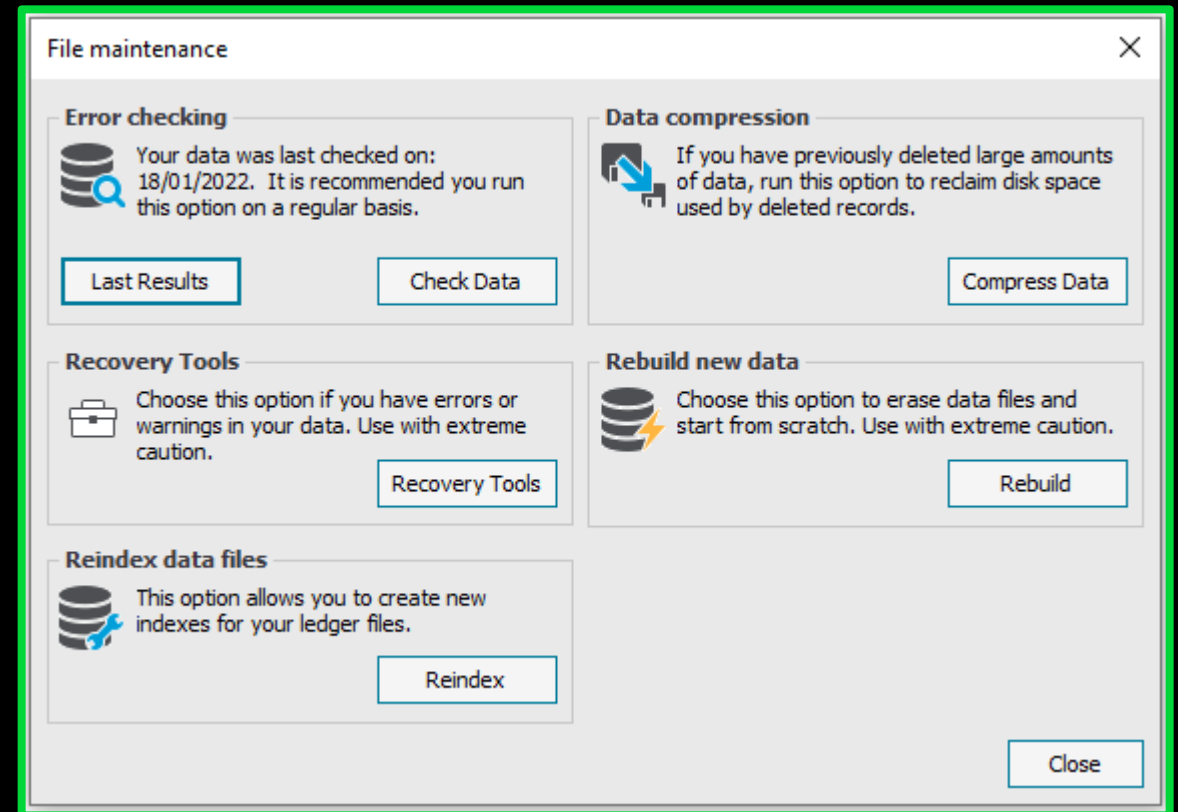 Parameters > Enable Data Management

Demonstration

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Compress data

- After deleting records compress the data to reduce size

- Always ensure you have an error free back up prior to running this routine

- The option can be found within:
File > Maintenance

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Summary

- Why data manage?

- Benefits of the Data Management tool

- Demonstration

- Importance of backing up

- Compress your data to reclaim disk space

How do I use Data management?

Created on 11 April 2022 | Last modified on 14 February 2024

Summary

How to use the new Data management feature in Sage 50 Accounts v28.1 and above.

Description

Data management is a new feature designed to make your daily processing as efficient as possible. It notifies you when your data volumes are approaching recommended levels and helps you remove customer and supplier records, audit trail transactions and customer invoices that you no longer need to view regularly. It's easy to use, so let's take a look.
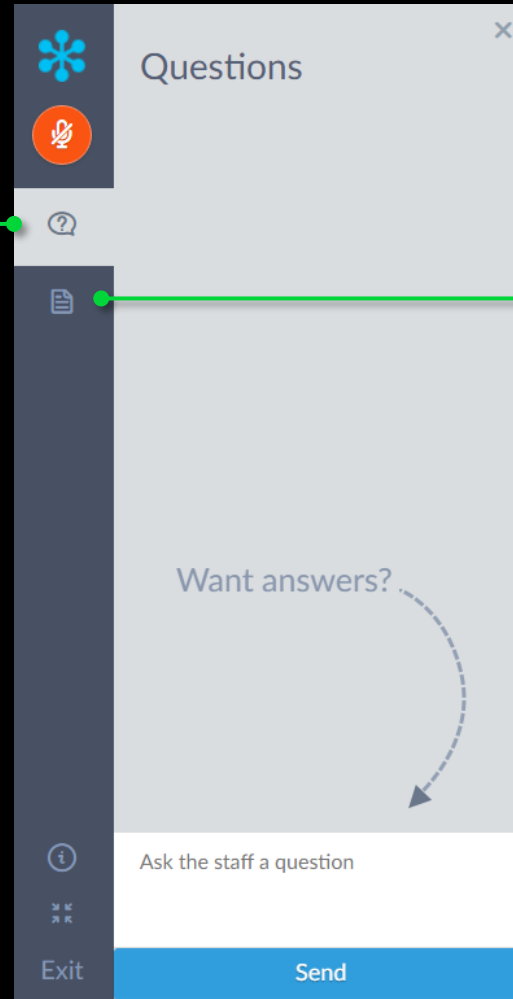
Resolution

Click here for article

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